



**LRS**<sup>®</sup>  
OUTPUT MANAGEMENT

# DRIVVE | DM

## Feature List

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## Drivve | DM Document Management

### Specification

#### Document search

- Full text search
- Search for index fields
- Search using criteria such as contains and starts with
- Search for ranges in numbers, currencies and dates
- Search using criteria such as Created at, Document date, Filing path, Barcode etc.
- Complex searches: Combination of multiple search criteria
- Save simple and complex searches to execute a search at a single click
- Configurable number of parallel search processes (not available in Drivve | DM Cloud)

#### Document overview

- Result list of a document search
- Overview of recently created and recently used documents
- Overview of all documents currently edited
- Delete a document
- Print a document
- View document journal
- Sorting of search results
- Thumbnail view of document pages
- Configurable thumbnail width and height
- Show linked workflow tasks
- Show document notes
- Resizable columns in list view
- Clip multiple documents

#### Views

- Custom navigation for documents
- Display documents for different target groups
- Views are displayed based on permissions

#### Document view

- Preview documents with the following formats: Office formats, Image, PDF, Email (MSG, EML), TXT, XML, HTML and CSV
- Full screen PDF view
- Document rotation
- Zoom function
- Scrolling from page to page
- Display of index data for each document
- Select Office documents in Drivve | DM and open them in the corresponding Office application

#### Document history (Journal)

- Chronological log of all document actions
- Journal can only be viewed by users with permissions
- Display of action type, username and date the action was performed at
- Listing of all document versions



### **Saving of documents**

- Comprehensive possibilities for capturing new documents:
  - via capture mask in the browser user interface
  - from the file system
  - using monitored folders
  - from Drivve | Image
  - from Microsoft Office applications (Word, Excel, PowerPoint)
  - using the Drivve | Image Scan Client for Drivve | DM (archiving of scanned documents)
  - Archiving of emails and email attachments from Microsoft Outlook or direct from email server
- Fulltext indexing (via OCR or text extraction) during the upload of documents. Support of formats such as PDF, Microsoft Office documents, email and image formats
- Indexing during storage
- Definition of mandatory index fields (visual identification), which must be filled in before uploading a document.
- Assigning a document to an user or group inbox

### **Filing documents**

- Save documents in configurable filing structures (cabinets, drawers, folders, binders)
- Import of predefined filing structures in CSV format
- Definition of filing shortcuts for quick navigation
- Assigning documents to spaces (for example project spaces, customer spaces, supplier spaces)

### **Document permissions**

- Permissions based on filing path
- Filing path permissions for single users and groups
- Filing path permissions determine the actions available for the documents within a filing path:
  - Reading documents
  - Downloading documents (including printing and sending via email)
  - Editing index data

### **Editing documents (check-in/check-out)**

- Locking of edited documents to prevent parallel editing
- The superuser may see all currently edited documents from all users and can cancel the editing for all documents.
- Direct editing from Microsoft Office applications
- Automatic versioning: If a document is checked in after editing, a new version of the document is created

### **Clipping**

- Clipping functionality for documents with a common context.
- Quickly view related documents
- The clipped documents are displayed in a separate panel
- Additional documents can be added to existing clippings

### **Retention periods**

Prerequisites: To use this function, the "Drivve | DM Retention Time Check Job" must be configured (see "Specification Drivve | DM Drivve | Jobs - Basic Module").

- Define retention periods for document types
- Delete documents after the retention period has been passed



- Definition of periods in which documents with expired retention period are still in the trash
- Possibility to define that retention periods may only expire at the last day of the month
- Email notification in the case documents with expired retention period are deleted

#### **Indexing of documents**

- Custom index fields
- Index-sets: Display of index fields based on custom criteria such as document type
- Multi-select and update index of multiple documents

#### **Enumeration ODBC**

- Allows querying an external database for index values in Drive | DM

#### **Sending documents**

- Sending documents via email - as attachment or as URL to the document in Drive | DM

#### **Document access for non Drive | DM users (public sharing)**

- Share URLs which can be accessed by non Drive | DM users to download documents from Drive | DM
- Restricting access of publicly shared documents to a configurable period
- Overview of all documents publicly shared by a single user
- Overview of all documents publicly shared as super-user
- Number of documents which can be publicly shared is restricted to 5 GB per instance.
- The following details will be shown for shared documents:
  - Document name
  - Date when the share was created
  - Date on which the share expires
  - User creating the share

#### **Document import**

- Import of documents located on the hard disk of your computer (see Specification Drive | DM Drive | Jobs - Additional Module Import)
- Import of emails and email attachment (see Specification Drive | DM Drive | Jobs - Additional Module Email)

#### **Time controlled export**

- Export of index data from documents in Drive | DM in a CSV file for further processing by third-party systems or for reporting purposes (see Specification Drive | DM Drive | Jobs - Basic Module)
- Export of documents from Drive | DM (see Specification Drive | DM Drive | Jobs - Additional Module Integration)

#### **Export of Result Lists**

- Document result list may be exported
- Export to a CSV file to quickly evaluate your data, e.g. in Microsoft® Excel.

#### **Synchronization**

- Server-based synchronization between folders of the file system and Drive | DM (see "Specification Drive | DM Drive | Jobs - Additional Module Integration")
- User-defined document synchronization between Drive | DM and the local hard disk (for example the hard disk of a laptop)



### **Integration of third-party systems**

- Adding data from an external data source to documents (see “Specification Drivve | DM Drivve | Jobs - Additional Module Integration”)

## **Drivve | DM Space Management**

### **Specification**

#### **Space search**

- Full text search
- Search using configurable criteria such as space name, created at, space type, space number etc.
- Search using index terms
- Complex Search: Combination of multiple search criteria
- Saving simple and complex searches in order to execute them at a single click
- Creating fields for searching spaces

#### **Space overview**

- Overview of spaces recently created
- Overview of spaces recently used
- Overview of deleted spaces
- Determining the columns displayed in the space overview

#### **Space view**

- Display of space details such as space type, space status, address data etc.
- Possibility to define custom index fields for space details
- Display of subspaces
- Display of linked workflows
- Display of assigned documents
- Searching documents within a space

#### **Space history (Journal)**

- Chronological log of all actions referring to a space
- Display of the type of action, user having performed the action and the date the action has been performed

#### **Creation of spaces**

- Manual space creation
- Automatic creation of spaces (see Specification Drivve | DM Drivve | Jobs - Additional Module Import)
- Automatic space creation via Drivve | Image file upload.
- Provide configurable index field values

#### **Permissions on spaces**

- Specifying the users/groups having access to a space
- Specifying the users/groups having the right to edit certain space fields

#### **Space actions**

- Assign documents to a space
- From within the space view: Search and select multiple documents in Drivve | DM and assign them to the current space
- Creating a URL for accessing a space



- Sending a space URL via email
- Creating space notes
- Deleting spaces into the trash bin
- Restoring deleted spaces
- Structuring spaces into subspaces
- Conditions for space actions: Performing space actions (editing space fields, starting workflows for spaces) if triggered by configurable conditions (see Specification Drive | DM Drive | Jobs - Additional Module Processes)

#### **Space import**

- Import of spaces from an ODBC database or a CSV file to Drive | DM
- Assigning additional field values to imported spaces

#### **Export of Result Lists**

- Export search result lists from spaces may be exported
- Export to a CSV file
- The export provides the option to quickly evaluate your data, e.g. in Microsoft<sup>®</sup> Excel.

#### **Space synchronization**

- Automatic synchronization of spaces with external data sources. Either CSV files or an ODBC data source may be used.

## **Drive | DM Workflow Management**

### **Specification**

Prerequisites: For the functionalities described below the Drive | DM Workflow license is required.

#### **Searching workflows**

- Simple searches using criteria such as owner, subject, status etc.
- Complex searches: Combination of multiple search criteria
- Saving simple or complex searches in order to execute at a single click

#### **Creating workflows**

- Manual creation of workflow for selected spaces and documents
- Creating workflows based on a workflow template
- Creation of workflows triggered by configurable conditions (see Specification Drive | DM Drive | Jobs - Basic Module)
- Creation of workflow templates
- Duplication of workflow templates
- Definition of due date, reminder and priority
- Definition of workflow tasks including the assignment to users or groups
- Creation of workflow notes
- Use of templates for workflow notes

#### **Display of workflows/workflow tasks**

- Overview of all workflow tasks of a single user
- Overview of the workflow tasks of selected users (requires a corresponding right)
- Graphical display of the complete workflow
- Display of workflow details such as creation date, due date or priority
- Display of the notes of a workflow



- Icon for workflow tasks already claimed, and workflow task not yet claimed
- Color coding of overdue workflows within the workflow task overview
- Display of the history of document assigned to a workflow - from inside the workflow view

#### **Configuration of the display of workflows/workflow tasks**

- Selection of the available columns and the column order within the task overview

#### **Workflow actions**

- Substitute function allows processing of a workflow during the absence of the user responsible for the workflow
- Creation of additional steps by the user currently owning the workflow.
- Possibility to end a workflow manually or to rewind the workflow to a previous step within the workflow
- Workflow notifications via email
- Assigning documents and space to a workflow
- Creating workflow notes
- Automatic updates of index values when the status of a workflow step changes. This can be configured in a workflow template.

#### **Export of Result Lists**

- Index values from workflow search result lists may be exported to a CSV file.
- The exported CSV provides the possibility to quickly evaluate your data, e.g. in Microsoft® Excel

## **General Functions**

#### **Dashboard**

- Quick overview of your important documents, spaces, and workflows
- Can be configured individually by each user
- Access is limited by permission.

#### **Switch Entities**

- Switch between entities (database instances) without explicit logout/login
- Choose entity to switch to from drop down list (no logout necessary)
- Only for Drive | DM on premise available

## **Drive | DM Administration**

#### **Program administration**

##### **Administration of index fields and columns for documents**

- Creation of custom index fields for documents
- Configuration of the order in which index fields are displayed
  - in the index panel
  - within the drop-down list of the search field
  - on the upload page
- Definition of columns for the document result list
- Definition of conditions to display a set of index fields (index sets)
- Definition of different index field types such as date, drop-down list or currency





### **Administration of index fields and columns for spaces**

- Creation of custom index fields for spaces
- Configuration of the order in which the index fields are displayed
  - in the index panel
  - within the drop-down list of the search field
  - on the page for creating spaces
- Definition of columns for the spaces result list
- Definition of conditions to display a set of index fields (index sets)
- Definition of different index field types such as date, drop-down list or currency

### **Creation and administration of workflow columns**

- Definition columns for the workflow overview

### **Administration of document types and space types**

- Creation of document types
- Creation of space types including space status values per space type
- Creation of retention periods for document types
  - Definition of retention periods per document type: After the expiration of a retention period, the documents of the respective document type are deleted
  - Definition the of the time documents remain in the trash bin after the expiration of their retention period
  - Definition that retention periods may only expire on the last day of the month
  - Definition that the settings of the retention period also apply for those documents archived before the last change of the retention period settings

### **Administration of filing structures and assignment of permissions to filing structures**

- Definition of filing structure using the filing objects cabinets, drawers, folders and binders
- Selection of the users/groups having access to the files of a filing path
- Restriction of the user/group access to
  - reading documents
  - downloading documents
  - modifying index data

### **Role-base rights administration**

- Creation of rights (roles) based on a rights template
- Rights template consists of functional rights grouped according to the following sections: Documents, Spaces, Journal & Notes, Workflows, Bookkeeper, Administration
- Assignment of rights to users

### **User administration**

- Integrated user administration
- Microsoft Active Directory integration including automated login via Single Sign-on (NTLM)
- Active Directory synchronization of users and groups

### **Group administration**

- Creation and administration of groups
- Assignment of users to groups
- Use of groups:
  - Assignment of the access to the documents of a filing path
  - Assignment of workflow steps
- Overview of all groups including the number of users per group



- Groups can be generated via Active Directory synchronization

#### **Administration of space permissions**

- Selection of the user/groups allowed to modify a space index field

#### **Administration of email address books**

- Creation of email address books based on CSV template or Outlook address book.

#### **Administration of text templates**

- Creation of text templates for document notes, workflow notes, space notes and emails
- Administration of text templates in different languages
- Determining the users/groups allowed to use a text template

#### **Administration of workflow templates**

- Creation of workflow templates
- Determining the users/groups allowed to use a workflow template

### **User-specific administration**

#### **General**

- Configuration of the start page (for example display of the last changes, of the inbox or of the archiving page)
- Determining that the file name of document is used as document name when archiving the document
- Specifying the maximum number of hits displayed on a page
- Specifying the number of documents displayed on the Drive | DM page **Recently used**
- Specifying the number of spaces displayed on the Drive | DM page **Recently used**
- Specifying the number of spaces displayed on the Drive | DM page **Recently created**
- Specifying the number of documents displayed on the Drive | DM page **Last created documents**
- Specifying whether the inbox is refreshed manually or automatically (in configurable intervals)
- Specifying whether the workflow list is refreshed manually or automatically (in configurable intervals)
- Specifying the width of the space auto-complete list within the index panel.
- Specifying the start page in the space detail view.

#### **Email signatures**

- Creation and administration of email signatures

#### **Substitute function**

- Selection of the users/groups acting as substitute for a user
- Selection of the users/groups a user acts as substitute for
- Out-of-office function

#### **Password**

- Changing the user password

#### **Digital Signature**

- Save a user specific signature image.
- This image may be used for digitally signing a document, if an additional digital certificate is available for this installation.



## Drivve | DM PDF Viewer

### Specification

Drivve | DM provides a powerful PDF Viewer.

The following file formats are supported in the browser preview:

pdf, doc, docx, xls, xlsx, ppt, pptx, pps, odg, odp, ods, odt, rtf, txt, msg, eml, bmp, gif, jpg, jpeg, png, svg, tif, tiff, csv, xml, htm, html, shtml.

For all supported formats the following features are available:

- Full view of any document page
- A sidebar with thumbnail views for a quick document overview.
- Mark and copy text within the viewer, if the full text for this document is available.
- Mark text and drag the text into the index panel for quick indexing.
- Full text search within the document, if the full text is available. The search text is marked in the document.
- After a full text search within Drivve | DM, the search is marked within the document.
- Scroll through all document pages.
- Zoom in, zoom out
- Jump to document page
- Turn the page in 90° steps.
- Jump directly to the next document, if the full view was called from a document list

For native PDF documents the viewer provided additional options to create annotations within the document.

- Predefined text and image stamps can be added to the document.
- Predefined text stamps may contain variables like the username or the date.
- A new document version will be creating for text stamps, image stamps and signatures.
- Additional annotations can be added to the document:
- PDF text comments can be created. They are displayed as little bubbles.
- Free text or drawing may be added to the document in different colors.
- Text within the Document can be marked with different colors.
- These additional annotations are saved as a separate PDF Layer. No document version is created for the additional annotations.
- If such a document is downloaded or printed, it can be decided to add the additional layers or not.

### Digital signature

- Signature image must be configured in the user-settings
- Add your personal signature image to a PDF document
- If a certificate for a digital signature is provided on the server, the document can be digitally signed with your personal signature.
- The server certificate must be uploaded in the formats p12 or pfx
- With the signature it is possible to verify that the PDF has not been modified after the signature has been applied
- A digitally signed document is marked with a blue signature bar at the top of the document



## Drivve | DM Bookkeeper

### Specification

The Drivve | DM Bookkeeper License is required to use the Bookkeeper module.

With the Drivve | DM Bookkeeper accounting data can be pre-assigned. The account assignment data can be exported to be subsequently posted in your accounting software.

Via a URL, there is a link from the exported data record to the document in Drivve | DM.

### Master data maintenance

- Definition of document types or filing types for which an account assignment is relevant, e.g. all bills and credit notes.
- Import of ledger accounts from CSV file possible.
- Definition of the ledger currency. The currency is always valid for all accounts.
- Import of cost centers via CSV file possible. The cost units can be hidden in the account assignment mask
- Import suppliers via CSV file or by linking to Drivve | DM spaces.
- Import of cost units via CSV file possible (optional). The cost units can be hidden in the account assignment mask
- Import projects via CSV file or by linking to Drivve | DM files (optional). Projects can be hidden in the account assignment mask
- Definition of VAT rates and VAT codes.
- Set net / gross as the default for account assignment.
- Define an automatic mapping of default index values to the booking record to prevent duplicate data entry.

### Account assignment on the document

- Selection of the creditor by auto complete. Is the supplier is assigned with a Drivve | DM space and already assigned to the document as a space, the supplier is automatically filled.
- Amount
- Selection of net / gross for the amount. The definition from the master data is preselected.
- Invoice number
- Document date
- Description

### Entering the ledger accounts

- Selection of ledger accounts by auto complete. Split postings with several ledger accounts are possible. Pre-filled are 100% of the amount with the standard VAT rate.
- A posting text can be added per ledger account.
- For each ledger account, an optional cost center, cost unit and project can be assigned.

The account assignment data can be edited until released. After approval, editing is no longer possible.

### Export

- Released booking records can be exported manually.
  - The target format is a generic CSV output as well as a booking batch in DATEV ASCII format.
- Released booking records can be automatically exported via Drivve | Jobs to the DATEV ASCII format.



### Permissions

- View Booking Data
- Edit Booking Data
- Release Booking Data
- Manage Booking Data

## Drivve | DM Guest Licenses

### Specification

The Drivve | DM guest licenses provide a way to add users with significantly reduced rights. These are suitable for users who want to find documents, audits, sharing documents in the system in project work, and similar scenarios.

The price of a Drivve | DM guest license significantly lower than a full-fledged Drivve | DM CAL user license. For users who only need the rights available for guest licenses, a guest license can be ordered instead of a CAL license.

For the Drivve | DM Guest License a new permission template is available. The administrator can assign the following permissions to a guest:

### Available Permissions

#### Documents

- Search documents
- Download documents
- Print documents
- Email documents

#### Journal & Notes

- View audit trail
- View notes
- Add Notes

#### Spaces

- View Spaces

#### Booking

- View Booking

Note: Guest licenses as well as workflow licenses are always named users. In contrast to workflow licenses, this is a mixture of NAL and CAL license, thus a guest license does not block a CAL user license.

## Drivve | DM Cloud

### Specification

#### Physical Environment

- The virtual data centers are in different fire compartments. Data is backed up on a doubly redundant basis and thus fourfold. The network is 100% redundant, because all systems dispose of 2 network cards connected to a 100% redundant InfiniBand network.
- 24x7 security service



- 24x7 monitoring system, swipe-card access, biometric identification system, intrusion detection technology and video surveillance
- Emergency power supply– 8 diesel engines with an overall performance of 12.800 kVA
- Environmental Monitoring – Host computer environments, including temperature, humidity and power-supply quality, are monitored to identify conditions that might adversely affect the operation of computer equipment and to facilitate corrective action.
- Capacity Planning – Capacity requirements are monitored, and future requirements projected, to reduce the risk of system overload.
- European data centers are based in Germany and respect the GDPR and data security policies.
- Certifications of the data center:
  - ISO 9001
  - ISO 27001
  - PCI-DSS
  - SSAE16 / ISAE3402

### **Network Management**

- Network Monitoring – 24/7/365 security monitoring of the network. Security of computer networks are monitored 24/7/365 and managed to safeguard information and to protect the supporting infrastructure.

### **Electronic File Access**

- Secured Socket Layer – All communication is delivered over an industry-standard encrypted SSL.
- Access Controls – User access to files is strictly granted on permissions basis, which administrators can easily change.

### **Backup**

- Regular backups are performed for all Driveve | DM customer data.

## **Driveve | DM OCR-Service**

### **Specification**

Note: The Driveve | DM OCR-Services are available for on premise installations only, not for Driveve | DM Cloud. For the functionalities described below, the license Driveve | DM OCR-Services is required.

- Server-based OCR service for the full text indexing of documents in Driveve | DM
- Full text indexing via OCR is supported for documents with the following formats: pdf, msg, eml, doc, docx, pps, ppt, pptx, xls, xlsx, txt, jpg, jpeg, jpe, png, tiff, tif, pnm, gif
- OCR service checks within configurable intervals whether there are new documents requiring full text indexing
- Defining a maximum number of parallel OCR processes
- Defining the maximum size of the cache folder storing the full images and the thumbnails of the documents.

## **Driveve | DM Driveve | Jobs - Basic Module**

### **Specification**

Note: For the functionalities described below, the license Basic Module is required.

All jobs can be used both with Driveve | DM installations and Driveve | DM Cloud.

Caution: Depending on the amount of data and the frequency a job is running; jobs can cause a high load on the server.



### **Drive | DM Workflow Notification Job**

This job monitors modifications within workflow statuses and sends email notifications.

Available functions:

- Sending daily workflow overviews
- Options for sending daily workflow overviews:
  - Defining a time for the daily sending of email notifications
  - Defining the tasks to be included in the daily overview (new, claimed but not due, due and overdue)
  - Defining email subject and email text
  - Specifying the users to whom no daily workflow overview is to be sent
- Email notification for changed statuses within the workflows of the respective user
- Options for email notifications for changed statuses within the workflows of the respective user:
  - Specifying the tasks to be monitored (new tasks, due tasks, overdue tasks)
  - Defining email subject and email text
  - Specifying the users not to be notified if workflow statuses change
- Automatic actions if the status of workflow task changes:
  - Specifying the workflow templates and the workflow steps to be monitored
  - Specifying the status changes (new, due, overdue, completed, canceled) of the workflow tasks for which actions are to be performed
  - Email notification (Selection of the user to be notified if workflow statuses do change)
  - Changing space fields if the workflow is related to a space
  - Changing document fields for all documents of a workflow

### **Drive | DM Active Directory Synchronization Job**

This job synchronizes users and groups between an Active Directory and Drive | DM.

Available functions:

- Specifying Active Directory parameters
- Comprehensive synchronization options:
  - Synchronizing users and groups between an Active Directory and Drive | DM
  - Synchronizing modifications (nice names, email addresses and department of the respective user) made to users from an Active Directory with users in Drive | DM having the same login name
  - Synchronizing the group assignment from an Active Directory with Drive | DM allows a central user configuration via Active Directory
- Possible email notification after each synchronization containing the following information:
  - All users created Drive | DM
  - All users who could not be created in Drive | DM
  - All modifications made to those users having been synchronized from an Active Directory to Drive | DM

### **Index Export Job**

This job exports index data for spaces, documents or workflows from Drive | DM into the CSV format.

Possible use case: Further processing by third-party systems or reporting purposes

Available functions:

- Specifying whether index data for spaces, documents or workflows are to be exported
- Defining search conditions for the spaces, documents or workflows to be exported
- Specifying the index fields to be exported



- Selection of field separators for the export file
- Selection of the folder the export file is saved to
- Defining a name for the export file
- Determining whether the file is overwritten with new data or whether the new data is appended within the file
- Possibility to send the export file via email
- Specifying whether new values are assigned to certain fields of the exported data

### **Workflow Trigger Job**

This job starts workflows for documents meeting specified conditions.

Available functions:

- Selection of the workflow template to be used
- Defining search conditions for the selection of documents for workflows are to be started
- Selection of document fields to be used as workflow names
- Determining that only those documents are to be considered having been modified after a configurable date
- Dynamic setting of assignees for individual workflow steps, based on index values
- Updating document index values after the start of a workflow

### **Drive | DM Retention Time Check Job**

This job deletes documents the retention period of which has expired.

Available functions:

- Verifying the retention periods of documents
- Deleting all documents
  - with an expired retention period
  - for which the period within the recycle bin has been expired
- Email notification on deleted documents
- Automatic start of workflows for documents with an expired retention period
- Automatic modification of index fields for documents with an expired retention period

### **Record Actions Job**

The job executes the following optional actions, if a search condition is met for documents or spaces:

- Send an email with a list of documents or spaces if the search condition is met.
- Update index field values of the matching documents or spaces.

### **DATEV Export Job**

The job exports booking records from Drive | DM into the DATEV ASCII format.

This file format can be imported again into the DATEV booking software.

Available functions:

- Configuration of the required DATEV properties.
- The export is filtering the records of the current configured fiscal year.
- The exported booking records are set to the status "exported" in Drive | DM.





## Drivve | DM Drivve | Jobs - Additional Module Email

### Specification

**Note:** For the functionalities described below, the licenses Basic Module and Additional Module Email are required.

All jobs can be used both with Drivve | DM installations and Drivve | DM Cloud.

**Caution:** Depending on the amount of data and the frequency a job is running; jobs can cause a high load on the Cloud server.

### Email to File System Job

This job saves emails and email attachments from one email mailbox to the hard disc of a computer.

Available functions:

- Export of emails (including index data) and their attachments (for example invoices) from an email mailbox into separate folder within the file system
- Support of Exchange (EWS), IMAP and Pop3 mailboxes
- After archiving, emails can be deleted from the mail server or moved to another folder
- Options for archived emails:
  - Saving emails as EML files
  - Selection of the folder the exported emails are saved to
  - Extraction of the index data of an email and export of the index data into an XML file
  - Transformation of emails as an XML file into a text-based format using XSLT, selection of the XSLT file to be used
- Possibility to archive email attachments separately in Drivve | DM
- Options for archived email attachments:
  - Saving an email attachment in its original format
  - Selection of the folder the exported email attachments are saved to
  - Possibility to restrict the archiving of email attachments to selected file formats
  - Extraction of index data and export of the index data as XML file
  - Transformation of email attachments as an XML file into a text-based format using XSLT, selection of the XSLT file to be used

### Email Archive Job

This job archives emails and email attachments from one or multiple mailboxes in Drivve | DM.

Available functions:

- Support of Exchange (EWS), IMAP and Pop3 mailboxes
- After archiving, emails can be deleted from the mail server or moved to another folder
- Options for archived emails:
  - Saving archived emails as EML files
  - Indexing archived emails (for example assigning a filing path in Drivve | DM)
- Possibility to archive email attachments separately in Drivve | DM
- Options for archived email attachments:
  - Possibility to restrict the archiving of email attachments to selected file formats
  - Indexing archived email attachments (for example assigning a filing path in Drivve | DM)



## Drive | DM Drive | Jobs - Additional Module Import

### Specification

Note: For the functionalities described below, the licenses Basic Module and Additional Module Import are required.

All jobs can be used both with Drive | DM installations and Drive | DM Cloud.

Caution: Depending on the amount of data and the frequency a job is running; jobs can cause a high load on the Cloud server.

### Space Import Job

This job imports spaces from an ODBC database or a CSV file to Drive | DM.

Available functions:

- Determine whether data from a CSV file or an ODBC database are imported
- Defining field separators for the CSV import
- Possibility to assign fields with static values to the imported spaces (for example type "supplier space")
- Assigning fields of the imported data to fields in Drive | DM

### File Import Job

This job imports files with XML meta data to Drive | DM.

Possible use case: Migration of the data of third-party systems.

Available functions:

- Import of files from the hard disc of your computer to Drive | DM
- Assigning index fields with fixed values to each file imported
- In the case of file pairs (document and corresponding XML meta file), index fields and their values can be extracted from the XML meta file and the extracted values can be assigned to index fields in Drive | DM
- After the import: Possibility to delete imported files from the hard disc or move them to another folder
- Possibility to create a CSV log file to be able to document and evaluate errors having occurred during the import

## Drive | DM Drive | Jobs - Additional Module Integration

### Specification

Note: For the functionalities described below, the licenses Basic Module and Additional Module Integration are required.

All jobs can be used both with Drive | DM installations and Drive | DM Cloud.

Caution: Depending on the amount of data and the frequency a job is running; jobs can cause a high load on the Cloud server.

### Synchronization Job

This job synchronizes documents or spaces including index data from Drive | DM with the hard disc of your computer. Available functions:

- Selection of the target folder on the hard disc
- Determining whether documents or spaces are synchronized



- Definition of search criteria for documents or spaces
- Unidirectional synchronization: From Drivve | DM to the hard disc of your computer
- Optional export of XML meta files for all synchronized documents
- Transformation of XML meta files via XSLT into a text-based format
- Determining actions to be performed after synchronization such as
  - Copying synchronized documents to another folder
  - Deleting synchronized documents from Drivve | DM
  - Modifying index data in Drivve | DM
- Display of all document modifications having been made on the hard disc within a configurable period

### **ODBC Lookup Validation Job**

This job adds data from an external data source to documents or spaces in Drivve | DM.

Available functions:

- Determining whether the data is added to documents or spaces
- Defining criteria for the selection of documents or spaces
- Selection of the data to be returned by the query (result fields)
- Values of result fields can be used as variables or key fields for the SQL query
- Definition of the SQL query to extract the required data from the external data source
- Assigning the selected SQL database fields of the external database to the index fields of documents or spaces in Drivve | DM
- Determining the fields to be changed in Drivve | DM if a result is found for the current data set
- Determining the fields to be changed in Drivve | DM if no result is found for the current data set

### **Data Export Job**

This job exports documents from Drivve | DM to a hard disc.

Available functions:

- Defining search conditions for the documents to be exported
- Specifying whether index fields are exported, selection of the index files to be exported (either all index fields available in the Drivve | DM Management Console or index fields previously selected by the user)
- Optional export of XML meta files for all exported documents
- Optional transformation of XML meta files in a text-based format using XSL
- Selection of the target folder on the hard disc
- Specifying whether after the export new values are assigned to certain Drivve | DM index fields of the exported documents

### **Factur-X Job**

This job extracts meta values from Factur-X compliant documents and saves the values as Drivve | DM index values. Available functions:

- Defining search conditions for documents within Drivve | DM.
- Assign Factur-X fields to the corresponding Drivve | DM index fields.
- Update additional index fields in Drivve | DM, if Factur-X values have been found in a document.
- Update additional index fields in Drivve | DM, if no Factur-X values have been found in a document



## Drivve | DM Drivve | Jobs - Additional Module Processes

### Specification

Note: For the functionalities described below, the licenses Basic Module and Additional Module Processes are required.

All jobs can be used both with Drivve | DM installations and Drivve | DM Cloud.

Caution: Depending on the amount of data and the frequency a job is running; jobs can cause a high load on the Cloud server.

### Space Conditions Job

This job executes space actions (changing space fields, starting workflow and sending email notifications) triggered by definable conditions referring to documents in spaces.

Available functions:

- Defining conditions for the selection of spaces
- Defining conditions for the documents within the selected spaces
- Possible actions if document conditions are met:
- Changing space fields:
  - Selection of the space fields to be changed
  - Defining the new values of the space fields to be changed
- Sending emails for executed actions:
  - Possibility to use variables within the email (for example for the name of a space)
- Starting workflows for selected spaces:
  - Definition of the name for the workflow to be created using variables (for example the name of a space)
  - Selection of the workflow template to be used

## Drivve | Image Scan Client for Drivve | DM

### Specification

Note: For the functions described below, the license Drivve | Image Scan Client for Drivve | DM is required.

- Scanning documents with any scanner supporting the TWAIN protocol
- Possibility to choose between the scan dialog of the scanner or the scan dialog of the Drivve | Image Scan Client for Drivve | DM
- Additional options like file format, color selection, and removal of blank pages
- Preview of the scanned documents
- Indexing scanned documents and archiving them in Drivve | DM

## Drivve | DM Desktop Client

### Specification

- Archiving and indexing documents
  - from Microsoft Office applications (Word, Excel, PowerPoint, Outlook)
  - from the file menu using the context menu ("Send to" menu item)
  - via hot folder
  - via the Drivve | Image scan client for Drivve | DM (can be used with any scanner supporting the TWAIN protocol)



- Determining the file formats allowed to be archived and indexed via hot folder
- Bidirectional synchronization of files between Drive | DM and the local hard disc of your computer
- Multiple authentication options:
  - Login with username and password of the local Drive | DM instance
  - Login with Windows user (using the Windows User Principal Name as Drive | DM login name)
  - Login with Windows user (using the Windows username without domain as Drive | DM login name)
  - Login with Drive | DM user and Certificate (only Drive | DM Cloud)
- Silent installation of the Desktop Client possible

## Drive | DM Mobile App for iOS and Android

### General

- Multiple logins for cloud or on-premise instances can be managed.
- Logout to end the current session.
- Info page to see current information about the app.
- Drive | DM permissions are also applied in App.

### Documents

- Search documents via free search.
- Upload new Documents via share function of the mobile operating system.
- Search documents via saved searches from Drive | DM.
- See recently used documents.
- Detail view with document properties.
- See notes or add new notes.
- See linked files.
- See linked tasks.
- PDF view for all supported document formats in Drive | DM.
- Share documents as an attachment or as a link. (Also share with other apps).
- Share a document on the mobile device with the Drive | DM App.
- The user may provide the following attributes for the Drive | DM upload:
  - Document name
  - Filing shortcut
  - User Inbox
  - Workflow Template
- After saving, the detail view of the document is displayed in the app.

### Spaces

- Search spaces via free search.
- Find spaces via saved searches from Drive | DM.
- See last used spaces.
- Detail view with space properties.
- See notes or add new notes.
- See linked documents.
- See linked tasks.
- See sub-spaces
- Share space as link.



### **Workflows**

- See documents of your own inbox.
- See open tasks.
- See detail view of a task
- Accept task.
- Complete task.
- Share task as link.
- See documents of a task.
- See notes or add new notes.
- See linked files of a task.